LEA Grant Director
ePlan Overview

1. **If an ePlan user is not able to work in an application, it is usually due to one of these three reasons:**
   1. The user is not using the **Google Chrome** browser. (For best results: always use Google Chrome to access ePlan. ePlan does not have the same functionality in other browsers.)
   2. The application is not in the **right work step** or status. Only a *Draft Started* or *Revision Started* status will allow LEAs to edit.
   3. The user does not have the **right role** to work on the application. Access the address book to see which roles an ePlan user has.

2. **ePlan's address book for each LEA contains a list of every user that has an ePlan role.**
   - The *LEA Role Contacts* list all the roles. If the role is not listed in the address book, no one has been assigned to that role.
   - The *LEA Funding Application contacts* are contacts selected for a funding application.
     o A **contact** is not the same as a role. A **role** assigns access to complete a task in ePlan.
   - *User Access forms* are in ePlan's TDOE Resources in the *User Access Form* folder.
     o Users do not need an ePlan role to access *TDOE Resources*.

3. **The Typical Workflow for Every Application is the Following:**

1. *Draft Started*	**These three user roles can start a draft:** • The application's *Grant Director* • *LEA Fiscal Representative* • *LEA Authorized Representative*
2. *Draft Completed*	**Only the applications *Grant Director* can complete the draft or revision.**
3. *LEA Fiscal Representative Approved/Not Approved*	
4. *LEA Authorized Representative Approved/Not Approved*	
5. *TDOE Review/Approval/Not Approved*	

4. **Validation Messages**
   - This feature shows any **errors** that will prevent an application from moving forward.
   - Click the **messages** under **Validation** on the **Sections** page to see any errors or warnings.

Description (View Sections Only View All Pages)	Revision	Validation	Print ☐ Select Items
All	Details	Messages	Print

5. **Reimbursement Requests**
   - Reimbursement Requests can only be submitted one at a time by a user with the ***Fiscal Update Role.***
   - Reimbursement Requests cannot be submitted until the application is approved by the department.
     o Only budget items that have been approved can be requested for reimbursement.